



## **Homeless Prevention and Rapid Re-Housing Case Management Training**

The Homeless Prevention and Rapid Re-Housing (HPRP) Case Management Training will introduce users to many of the Case Management tools available within the Homeless Management Information System (HMIS). This training will focus primarily on Action Plans. Case Managers will learn how to record goals for their clients and update the client's progress towards those goals.

### **Training Outline**

- Review of the Basics – Page 2
- The Services Menu – Page 3
- Service Coordinators – Page 5
- Charting Timetable – Page 6
- Action Plans – Page 8
  - Creating the Action Plan – Page 9
  - The Review Schedule – Page 12
  - Reviewing the Action Plan – Page 13
  - Revising the Action Plan – Page 15
- Permissions – Page 17
- Review & Questions – Page 18

## **Review of Basics**

### **The New User Training**

Before attending this Case Management Training users should already be proficient in the basics of using HMIS to admit clients and record services. In the New User FDM Training we cover the full Client Intake Process from Admission to Discharge. Users learned how to:

- Lookup clients using Client Lookup
- Admit clients into your programs accurately and completely
- Learn the rules governing the sharing of information
- Record Household and Children's Information
- Record External Housing Information
- Record Cash Assistance Records
- Record Services under Contact Logs
- Record Referrals
- Clone Client Information from one program into another
- Close a Client's Record using Discharge

### **Accessing Chart Records**

Remember that searching for current clients using the Client Lookup button will allow you to access a client's Chart Records. Under a client's Chart Records you can access their:

- Face Sheet
- Progress Notes
- Contact Logs (The Supportive Services Checklist)
- Charting Timetable Events
- And Service Plans (The Action Plans)

### **Getting Help**

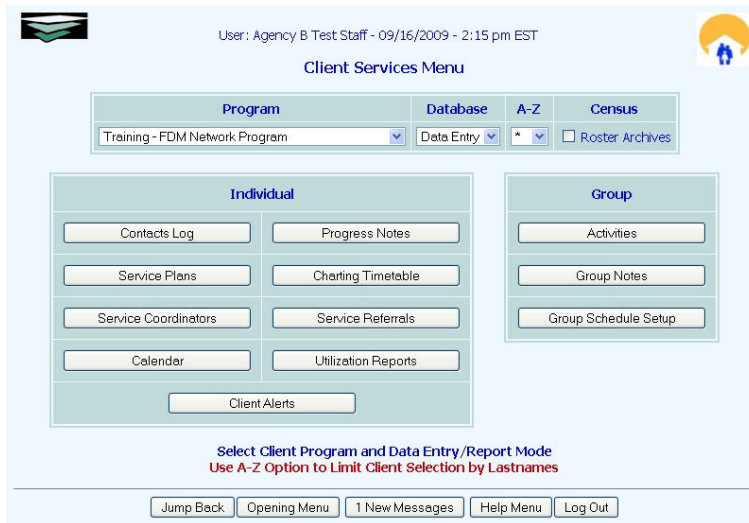
Remember that there is online help available all the time. The Help Menu is found at the bottom of every page and contains:

- AWARDS Online Help (an online instructional manual)
- AWARDS Training Information (printable instructional documents)
- Help Desk (a secure internal messaging system allowing you to send messages to HMIS staff)



## The Services Menu

Users can access the Client Services Menu by clicking “Services” on the Opening Menu. Below is a screenshot of the Services Menu.



The Services Menu contains several different sections used by Case Managers to document their client's activities.

- **Contact Logs** – Also known as the Supportive Services Checklist, this section allows you to record the material goods and services you have provided to clients.
- **Progress Notes** – Record notes about your clients and document the time spent working with clients.
- **Service Plans** – Also known as “Action Plans”, this section allows you to set goals for your clients and track their progress on each of the goals.
- **Charting Timetable** – Record appointments and charting events for your clients.
- **Service Coordinators** – Change the assigned Case Manager.
- **Service Referrals** – Document the referrals that you have made for your clients.
- **Calendar** – See an interactive calendar of appointments for yourself, your staff and your clients.
- **Utilization Reports** – A selection of reports tracking the amount of time spent with clients.
- **Client Alerts** – Leave public alerts about clients which will show up as a flag icon under Client Lookup. This functionality is limited to the Executive Level Users at an agency.
- **Group Activities and Group Notes** – Record attendance for group functions and leave notes for groups of people.



**Using the Services Menu:**

- The Database Drop Down allows you to change between Data Entry mode and Report Mode. Being in Report Mode allows you to run printable reports on the data that has been entered. In Data Entry mode you are often limited to entering data within a particular date range (usually the last 30 days). In Report Mode you can view data that is outside of your limited data entry date range.
- The date ranges that you are limited to in Data Entry mode and Report Mode are controlled by the Business Rules set up for your program. These Business Rules can sometimes be changed upon request.
- The A-Z Filter will simply filter the list of clients to only show client's whose last name starts with the letter selected. The default asterisk (\*) will show all clients.
- The Roster Archives selection allows you to enter data on clients who have already been discharged from a program.
- For active clients, many of the sections found under Services can also be accessed directly from the client's Chart Records found under Client Lookup.

Contact Logs and Progress Notes are covered in the New User Training. Group Activities, Calendar, Client Alerts, and Utilization Reports are all covered in Specialized Trainings. For information on any of these trainings please visit the HMIS website at <http://www.in.gov/ihcda/>



## Service Coordinators

Use the “Service Coordinators” button to change a client’s assigned Case Manager or to get a list of all the clients on a caseload. The Service Coordinator is the staff person assigned to the care of a particular client. The words “Service Coordinator”, “Case Manager” and “Primary Worker” are often used interchangeably. The Primary Worker is initially assigned at Intake, but can be changed at any time.

While in Data Entry mode you will be able to select either one particular client and assign them to a new Primary Worker, or you can select one particular staff person and reassign all or some of their clients to a new staff person.

Training - FDM Network Program Service Coordinator Data Entry Selections

Coordinator	OR	Client
<input type="text"/>		<input type="text"/>

Select a Client to Change their Service Coordinator  
OR Select a Coordinator to Reassign Entire Caseload

In addition to setting the Primary Worker, you may also assign an optional “Backup Worker” and/or “Temporary Worker”. If no worker has been assigned to a particular client they can be marked as “Unassigned”. Once you have selected the new Primary Workers you can click “Update” to save the changes.

Training - Supportive Services Network Program Service Coordinator Assignments 09/16/2009

Client	Primary	Backup	Temporary
1. Brady Dog	Test Staff, Agency B	Unassigned	Unassigned

Use System Setup to Grant Chart Access Permission to Include Additional Staff in the Selection Options

UPDATE Jump Back Services Menu

To get a list of clients on a particular worker’s caseload, go back to the Services menu and choose Report Mode before clicking on “Service Coordinators”. While in Report Mode you can select one staff person or “All Coordinators”; or you can select just one client or “All Clients”. In addition you can choose to report out on just the Primary Worker, or you can choose to “Include Backup and Temporary” workers as well. You can sort the resulting list by Client or Worker.

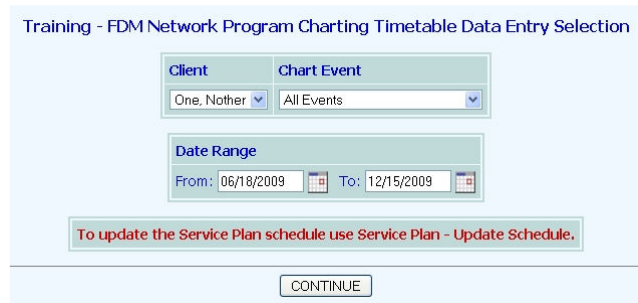
The resulting report shows you the clients, their assigned workers, and the client’s address (this is their Bed # or Apartment # in residential programs).



## Charting Timetables

Charting Timetables allow you to schedule appointments such as Doctor Appointments, or assessment events such as a new assessment of the Family Development Life Areas.

The appointments that you schedule will show up in the “Calendar” and you may receive optional internal audit messages reminding you of the events.



Training - FDM Network Program Charting Timetable Data Entry Selection

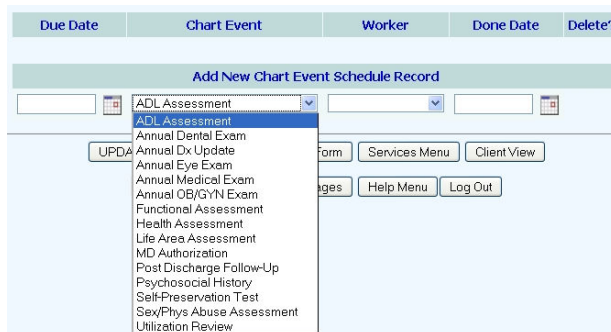
Client: One, Nother | Chart Event: All Events

Date Range: From: 06/18/2009 To: 12/15/2009

To update the Service Plan schedule use Service Plan - Update Schedule.

CONTINUE

To schedule an event make sure that the date range that is displayed covers the date of the events you want to record, then select the name of your client and hit “Continue”.



Due Date	Chart Event	Worker	Done Date	Delete?
Add New Chart Event Schedule Record				
<input type="text"/>	ADL Assessment	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="button" value="UPDA"/> <input type="button" value="Form"/> <input type="button" value="Services Menu"/> <input type="button" value="Client View"/> <input type="button" value="Pages"/> <input type="button" value="Help Menu"/> <input type="button" value="Log Out"/>				

Enter the date of that the event is due, choose the type of event from the “Chart Event” drop down, and choose the staff person (worker) who will be ensuring that the event is completed. Leave the Done Date blank until after the event has been completed. Click “Update” to save the event.

If you have the “Charting Timetable Reminders” permission, you will get an internal audit message reminding you of the event. This audit message will show up in your Messages module 3 weeks, 2 weeks, and 1 week before the due date of the event. After the due date is passed you will receive an audit message every 3 days until the event is marked “Done” by entering a “Done Date” for the event. This permission can be requested to be turned on or off through the Help Desk.



## Charting Timetables - Continued

### Scheduling a Life Area Assessment

If you would like to use Charting Events to update the Family Development Life Areas, you can schedule a "Life Area Assessment" for any time and perform that assessment using the "Assessment Data Module" found under the "Outcomes" menu.

Note: You do not need to use Charting Timetables to schedule a Life Area Assessment if you are using Action Plans since the Life Area Assessment is part of the Action Plan Review Process described later.

### Completing the Life Area Assessment

1. Go to the Outcomes Menu, select your program, and click "Assessment Data."
2. On the Assessment Selection page, select the name of your client and click "Continue."

All of the scheduled events from the date range selected will be displayed.

Open?	DueDate	Assessment Type	Worker	DoneDate
<input type="radio"/>	09/17/2009	Life Area Assessment	Agency B Test Staff	?

Use Charting Timetable to Add Assessment Types/Dates

3. Choose the "Life Area Assessment" by clicking the circle to the left and then click the "Open" button at the bottom.

You will now be taken to the Life Area Assessment data entry form.

4. Notice that you can schedule the next Assessment by entering a date in the "Next Follow-Up Assessment Due" date field. By default assessments are scheduled every 90 days.
5. Score all of the 12 Life Areas, recording whether the client is Thriving, Self-Sufficient, Stable, Vulnerable, or in Crisis for that Life Area. Use the Comment boxes to describe when you choose that threshold for each Life Area.
6. Click "Update" to save the Assessment.

For full training on the Family Development Matrix and how to score clients in the twelve Life Areas, please contact your local Network Administrator about taking a Family Development Course. These courses are usually coordinated by the local United Way Community Access Networks in each community.

### Completing an Event

After an event has been completed, you must go back to the Charting Timetable page and enter a "Done Date" for that event and click "Update" to save the change.

You can also delete scheduled events if you decide that something should not have been scheduled.





## Case Management Action Plans

The Case Management Action Plans allow you to set goals for your clients in each of the twelve Family Development Life Areas and then record the progress that client's make towards each of the goals. The Action Plan module also allows you to track your client's progress in the Family Development Matrix (FDM) by completing a Life Area Assessment each time you review a client's Action Plan. Action Plan Reviews are scheduled every 90 days, allowing you to come back in and review the goals and record the client's progress.

You can access the Action Plans from Client Lookup or from the Services Menu. From the Services Menu click on "Service Plans" and then select your client. You will then be taken to the Service Plan Index for that client.

### The Individual Service Plan Index

The Service Plan Index shows all of the Action Plans that have been completed or are scheduled to be completed.

**Individual Service Plan Index**

Client	Program	Worker	Admission
Fozzy Dog	Training - Supportive Services Network Program	Agency B Test Staff	02/10/2009

Selected	DueDate	Plan Type	Reviewer	Done	DoneDate
<input checked="" type="radio"/>	<u>03/10/2009</u>	Initial Family Development Action Plan	Agency B Test Staff	no	

Select the Service Plan to Add / Review / Revise using the radio buttons next to the plan, then click CONTINUE.

When you first access the Action Plans for a particular client you will find that an "Initial Family Development Action Plan" has already been scheduled for that client. This Initial Plan is where you simply list the goals you are setting for this client. Notice that the Initial Plan is scheduled for one month after the client's admission date.

- ❖ The Due Dates can be modified at any time by clicking on the "Update Schedule" button at the bottom of the Service Plan Index. Done Dates can also be entered by clicking "Update Schedule".
- ❖ To review a plan that has already been completed simply click on the underlined date in front of that plan. If you click on the date of a plan that has not yet been started you will get an error message that says "No Plan Data Found".
- ❖ To start a plan, or to edit an existing plan, choose the "Selected" button next to that plan and then click "Continue".





## Creating the Initial Case Management Action Plan

The first step is to record the goals that you are setting for your client. This step should ideally be done within the first thirty days of working with a client. It is often helpful to plan out your goals on paper. Paper forms of the Action Plan are available at on the HMIS website in the "Important Documents" page.

### Part 1 - Overview and Assessment

Start by selecting the "Initial Family Development Action" plan and hit "Continue."

You will start by completing an Assessment of the Matrix Life Areas.

Training - Supportive Services Network Program Initial Family Development Action Plan

Initial Family Development Action Plan Date: 03/10/2009  
 Client: Fozzy Dog

First Review Due Date: 05/11/2009  
 Prepared By: Agency B Test Staff

Life Area Assessment:	Comments:
Income: Vulnerable - 75%-149% of OMB Poverty Level	Earns about \$800/month to support a family
Adult Education: Crisis - No Diploma or GED	Dropped out in 10th grade.
Employment: Vulnerable - Part-time	Works 15 to 20 hours a week for \$8.50/hour.
Housing: Vulnerable - Temporary Housing or in danger of eviction or foreclosure	Living with his mother temporarily
Food: Stable - Food subsidies and budget meets the needs	His mom buys a lot of his food.
Child Care: Thriving - Child care of choice, or no children in household	No kids
Health Care: Vulnerable - Public Insurance, no primary care physician	Enrolled in Healthy Indiana Plan
Transportation: Vulnerable - No car, uses public transportation or other means but it limits choices	
Utilities: Stable - No more than one month behind, bills paid to avoid disconnect	Mother pays most of the bills for now.
Support Systems: Self-Sufficient - Access to family, friends, and community support	
Family Interaction: Self-Sufficient - Positive interaction and stability	Good relationship with mother.
Addictions: No history of abuse	
Poverty Thresholds	

UPDATE & CONTINUE

- ❖ Notice that by default the first Review Due Date is schedule for 90 days after a client's intake date. This is the approximate date that you will come in and review the client's progress towards the goals you will be setting. You can change this date now if you would like.
- ❖ Complete the Life Area Assessment marking a client's progress in all 12 of the Life Areas. Clients can be scored on a threshold of Thriving, Self-Sufficient, Stable, Vulnerable or Crisis.
- ❖ Include any Comments that will help other staff understand why a particular Threshold was selected.
- ❖ Press "Update and Continue" to save the Life Area Assessment and go on to the Treatment Plan.

## Part 2 The Action Plan – Setting the Goals and Objectives

This is where you actually record the goals that you are setting for your client. Each of the goals you set need to fall within one of the 12 Life Areas. You will be adding one goal at a time in one Life Area at a time. Each goal can have multiple steps needed to accomplish that goal.

03/10/2009 Fozzy Dog Treatment Plan Long Term Goal Thresholds, Intermediate Goals and Initial Goal

**ADD NEW LIFE AREA**

Long Term Goal Threshold Text & Life Area Selection are required fields for a New Entry.

Life Area:

Long Term Goal Threshold:   
Select a corresponding threshold from the dropdown above to replace the former Long Term Goal Threshold:

Beginning Threshold:

Problem / Issue:

**New Intermediate Goal**

**New Initial Goal #1:**  
**Start:**    
**Target Date:**

**New Initial Goal #2:**

- Start by choosing one of the twelve Life Areas.
- Select the “Long Term Goal Threshold”. This is where you would like the client to eventually strive to be on the Matrix. For example, under Education you may eventually want the client to receive an Associates Degree which is considered “Self-Sufficient.”
- The “Beginning Threshold” will display the client’s current threshold for that Life Area from their most recent Life Area assessment. This will be blank initially because it does not know what Life Area you are selecting.
- Use the “Problem/Issue” box to describe the client’s problems you are hoping to address.

Each Larger Goal that you set for a client will be called the “Intermediate Goal”. The Intermediate Goal will be broken down into smaller steps known as “Initial Goals”. Each Intermediate Goal can have as many steps (Initial Goals) as you would like.

- Write down the first Large Goal (Intermediate Goal) you want the client to accomplish.
- Write down all of the steps (Initial Goals) needed to accomplish that goal.
- For each Initial Goal you will need to enter a Start Date and a projected Target Date for completing the Goal.
- Note that the first available Start Date will be the date of your Initial Plan. When you come back in later to review the progress towards working on a goal you will only be able to mark progress attained up to the Start Date for that goal. When in doubt use an early Start Date.
- The Target Dates are for your guidance only and do not effect the plans moving forward.
- There is room to add four steps (Initial Goals), however you will be able to add more than four steps if you need to. Start by entering the first four steps.

## The Action Plan – Continued

To save the Goal click “Update” at the bottom of the page.

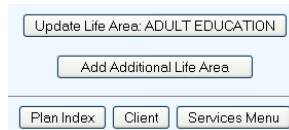
Make sure that all of your goals are SMART.

- **S**pecific
- **M**easurable
- **A**ttainable
- **R**ealistic
- **T**imely

For full training on the Family Development Matrix Action Plans and how to create good goals for your clients, please contact your local Network Administrator about taking the eight-day Family Development Certification Course. These courses are usually coordinated by the local United Way Community Access Networks in each community.

At this point you will be shown the plan as it currently exists with your one goal listed.

To add more goals to your Action Plan click the “Return to Data Entry” button. You can now choose to add on to first goal, add a second goal in the same Life Area, or begin working on a new Life Area.



- Choose “Update Life Area” to continue working with the existing Life Area.
- Choose “Add Additional Life Area” to start adding goals to a new Life Area.
- “Plan Index” will take you back to the list of existing plans. This is where you would go if you were done with this plan and wanted to mark it as finished (that process is explained below).
- “Client” would allow you select a new client to work with if you’re done working with this person and wanted to start working on someone else’s plan.

When you click “Update Life Area” you’ll be shown the goals you’ve currently written in that life area. Those goals can be edited at this time if you notice a mistake. You will also find a place to add a new step (Initial Goal) to your first goal, or a place to another Intermediate Goal. Click “Update” to save any changes you made. Repeat this process (“Return to Data Entry” > “Update Life Area” > Add new Goals) until you are done creating the plan for that Life Area.

Remember: At this stage you are only creating the plan; you are not reviewing the client’s progress towards any of the goals!

When you’re finished with one Life Area you can click the “Add Additional Life Areas” button to create goals in the other life areas. Repeat same steps as many times as you need.



### Part 3 - Marking the Plan as Done

When you're done creating the entire plan, it's time to go back to the Plan Index and mark the plan as Complete. Click "Plan Index" to go back to the list of existing plans. You'll notice at this point that in addition to the "Initial Plan" that you've been working on, a new "Plan Review" has been scheduled for the date that was entered at the start of your Initial Plan. That date is typically 90 days after a client's admission. To mark the Initial Plan as complete (meaning all the goals have been written down that you want the client to work on), click on "Update Schedule."

**Individual Family Development Action Plan Review Schedule**

Client	Program	Worker	Admission
Fozzy Dog	Training - Supportive Services Network Program	Agency B Test Staff	02/10/2009

Days	DueDate	Plan Type	Reviewer	Done	DoneDate	Delete?
28	03/10/2009	Family Development Action Plan	Test Staff, Agency B	Yes	03/29/2009	<input type="checkbox"/>
62	05/11/2009	Family Development Action Plan Review	Test Staff, Agency B	No		<input type="checkbox"/>
NEXT						
BACK						
FILL						

Due Dates Must Go In Order from Top to Bottom

You will now be on the Plan Review Schedule. Look for the "Family Development Action Plan" that you just finished working on. Change "Done" drop down to "Yes" and enter the Done Date as the date you finished creating the plan and entering it into the system.

The dates need be in chronological order and the Due Dates and Done Dates can not overlap.

Note: The dates on the schedule do not have anything to do with the goals you are setting, they are just the dates you worked on things in HMIS.

To save the changes click "Update Schedule." You will be shown the changes in confirmation mode. Click "Select Plan" to be taken back to the Plan Index.

**Individual Service Plan Index**

Client	Program	Worker	Admission
Fozzy Dog	Training - Supportive Services Network Program	Agency B Test Staff	02/10/2009

Selected	DueDate	Plan Type	Reviewer	Done	DoneDate
<input type="radio"/>	03/10/2009	Initial Family Development Action Plan	Agency B Test Staff	yes	03/29/2009
<input checked="" type="radio"/>	05/11/2009	Family Development Action Plan Review	Agency B Test Staff	no	

Select the Service Plan to Add / Review / Revise using the radio buttons next to the plan, then click CONTINUE.



## Part 4 – Reviewing the Action Plan

After you create the Action Plan, you are expected to Review the Action Plan to note what progress your client has made towards each of the goals and to consider whether any of the goals need to be revised. By default the first Review is scheduled for 90 days past the date of admission. It is assumed that you will Review the plan you created at the 90 day mark and every 3 months thereafter. You will be given an opportunity to change the default date each time you review a plan, or you can change the dates at any time by using the “Update Schedule” button. You are not required to review the plans on the exact date that they have been scheduled. You can review the plans early or late.

In the Action Plan Reviews you will review the progress you’ve made on the Action Plan you created, reevaluate or modify existing goals, and/or create new goals.

From the Plan Index select the “Family Development Action Plan Review” and hit “Continue”. If you click the Due Date of the plan instead of the Continue button you’ll be shown the Review as it currently exists, which at this point would be blank.

Each Action Plan Review starts with a new Assessment of the Family Development Matrix Life Areas. Be accurate and complete and use the Comment boxes when necessary. Press “Update & Continue” to save the Life Area Assessment and begin the Action Plan Review process.

At this point you will see the Action Plan that you created earlier in a Confirmation Mode.

Intermediate Goal	Pass the GED Test.
Review of Progress / Objective Achievement:	
Intermediate Goal Outcome:	<i>Not Evaluated Intermediate Goal Continued</i>
Initial Goal	Set up an appointment with our ABE instructor.
Initial Goal Outcome:	<i>Not Evaluated Initial Goal Continued Initial Goal Start: 03/10/2009 Target Date: 03/21/2009</i>
Initial Goal	Take the TABE Assessment Test.
Initial Goal Outcome:	<i>Not Evaluated Initial Goal Continued Initial Goal Start: 03/10/2009 Target Date: 04/01/2009</i>

Each of the Life Areas will be listed in alphabetical order and all of the goals for that Life Area will be displayed. At this point all of the goals are marked as “Not Evaluated” because we have not yet evaluated any of the goals. The goals are also all marked as “Goal Continued” because we have not yet marked whether any of the goals should be revised or discontinued.

Below each Life Area is an “Update Life Area” button which you will need to click in order to review the goals in that section. An additional button labeled “Add Additional Life Area” will be found at the bottom of the page, letting you create new goals in a new Life Area.

Click “Update Life Area” for the first Life Area that you would like to review.



## Reviewing the Action Plan – Continued

05/11/2009 Fozzy Dog Treatment Plan Long Term Goal Thresholds, Intermediate Goals and Initial Goal

Life Area: ADULT EDUCATION

Long Term Goal Threshold Text & Life Area Selection are required fields.

Life Area:

Long Term Goal Threshold:

Beginning Threshold:

Current Threshold:

Problem / Issue:

At the top you will be shown the Long-Term Goal Threshold that you selected for that Life Area, as well as the Beginning Threshold (the threshold that was selected when the plan was created) and the Current Threshold (the threshold that was selected when you started this review). You are able to make changes to the Long Term Goal Threshold if you realize that the Goal Threshold you selected was not ideal for that client.

You will also find the Problem statement and can make changes or additions to that statement if you desire.

Now you are ready to review each of the goals.

Review of Objective Progress Required for Every Objective Before Making ISP Changes to Any Objective.

**Intermediate Goal**

**Pass the GED Test.**

Review of Progress / Objective Achievement:

Intermediate Goal Outcome:  Outcome Achievement Date:

**Initial Goal**

**Set up an appointment with our ABE instructor.**

Initial Goal Outcome:  Outcome Achievement Date:  Initial Goal Start: 03/10/2009 Target Date: 03/21/2009

**Initial Goal**

**Take the TABE Assessment Test.**

Initial Goal Outcome:  Outcome Achievement Date:  Initial Goal Start: 03/10/2009 Target Date: 04/01/2009

Each Intermediate Goal will be displayed along with a text box where you can record the progress that the client has made on that goal. For each of the Intermediate Goals and Initial Goals you will be asked to mark the Outcome of that goal and the Achievement Date for that goal or step.

The Outcome choices are:

- Attained
- Progress
- No Progress
- Reconsidered
- Not Worked On

## Reviewing the Action Plan – Continued

You will not be able to revise any of the goals or add new goals until after you've reviewed each of the existing goals.

After you have reviewed each of the goals in that Life Area, click "Update" to save the information and continue the review process.

## Part 5 - Revising or Continuing Goals

After you review the goals you are taken back to the Action Plan in confirmation mode. Click "Return to Data Entry" to continue the process. When you are back in Data Entry mode you'll again see buttons allowing you to "Update Life Area". Click the Update button for the Life Area that you just reviewed.

All Goals, Objectives and Methods/Services are CONTINUED until they are Expressly Discontinued or Revised.

Each Intermediate Goal must have & Intermediate Goal

Intermediate Goal	
<p><b>Review of Progress / Objective Achievement:</b></p> <p><b>Intermediate Goal Outcome:</b></p>	<p>Pass the GED Test.</p> <div style="border: 1px solid #ccc; padding: 5px; margin: 5px;"> <p>Client has met with the ABE instructor and taken the TABE test. We learned that his reading and writing are at a 6th grade level. His math is at an 8th grade level. I have asked him to sign up with a tutor.</p> </div> <p style="text-align: right; margin-right: 20px;"><input type="button" value="Spell Check"/></p> <p> <input type="button" value="Progress"/> <input type="button" value="Outcome Achievement Date: 05/01/2009"/> <input type="button" value="Intermediate Goal Continued"/> <input type="button" value="Status Completion Date:"/> </p> <div style="border: 1px solid #ccc; padding: 5px; margin-top: 10px;"> <p>To Revise Intermediate Goal, Select "Intermediate Goal Revised" and Enter the Revised Text Below</p> <p style="color: red; font-size: small;">NOTICE: INITIAL GOALS OF THIS INTERMEDIATE GOAL MAY NOT BE REVISED ON THE SAME PAGE THAT YOU REVISE THE INTERMEDIATE GOAL.</p> </div> <div style="border: 1px solid #ccc; height: 30px; width: 100%; margin-top: 5px;"></div> <p style="text-align: right; margin-right: 20px;"><input type="button" value="Spell Check"/></p>

This time each of the goals will be listed again and in addition to the Outcome status that you recorded previously you now have the option of revising the goals or keeping them as they are.

To keep the existing goal, leave the status as "Intermediate Goal Continued."

To modify an existing goal, change the status to "Intermediate Goal Revised" and enter the revised goal in the box below.

To discontinue a goal so that it no longer shows up on future plans, change the status to "Intermediate Goal Discontinued." If you mark an Intermediate Goal as Discontinued then all of the Initial Goals or steps towards completing that goal will also be discontinued.

If an Intermediate Goal has been completed, then it should be marked as Discontinued and a Status Completion Date should be entered.



## Revising or Continuing Goals – Continued

After you mark the status of the Intermediate Goal you will then mark the status of each step or Initial Goal.

Initial Goal	
<b>Initial Goal</b>	Set up an appointment with our ABE instructor.
<b>Initial Goal Outcome:</b>	<div> <div>Attained</div> <div>Outcome Achievement Date: 03/15/2009</div> <div>Initial Goal Discontinued</div> <div>Status Completion Date:</div> </div> <div> <div>3/15/2009</div> <div>Initial Goal Start: 03/10/2009</div> <div>Target Date: 03/21/2009</div> </div>
To Revise Initial Goal, Select "Initial Goal Revised" and Enter Revised Text Below	
<div></div> <div>Spell Check</div>	

The Initial Goals are updated in the same fashion. Each Initial Goal will be marked as Continued, Revised or Discontinued. If an Initial Goal has been completed it should be marked as Discontinued and a Status Completion Date should be entered.

The text box below each Initial Goal is only to be used if you are revising that Initial Goal.

Below the last Initial Goal there will be an optional place to add a new Initial Goal if you want to add more steps to that goal. You will only be able to add one Initial Goal at a time. If you have multiple steps to add to a goal you will need to click "Update" to save the first goal and come back in to that Life Area to add additional goals.

<b>Add Initial Goal:</b>	<b>Enter Text Below to Add a Initial Goal</b> <div>Sign up with an ABE tutor.</div> <div>Target Date: 5/20/09</div> <div>Spell Check</div>
--------------------------	---

Below the last Intermediate Goal is a place to add a new Intermediate Goal and subsequent Initial Goals. You will need to add one Intermediate Goal at a time and come back in to that Life Area to add additional Intermediate Goals.

Click the "Update" button at the bottom of the page to save all of the changes. You will be taken back to the Action Plan and can continue the review process for each of the other Life Areas.

Remember that Reviewing an Action Plan is a two step process. First you Review the Progress on each of the existing goals one Life Area at a time. Then you mark the status of each goal and make changes to the plan one Life Area at a time. You will need to cycle through the same process for each Life Area until the entire plan has been reviewed and revised.

When you are done reviewing the Action Plan you will need to mark the Review as being complete. Click on "Plan Index" and then "Update Schedule" to be taken to the Review Schedule. Mark the review as "Done" and add a Done Date for that Review. This is the date that you finished reviewing progress. The client then has three more months to work on their goals before the next review.



## Permissions

Permissions govern who has access to what parts of the database as well as control different settings, such as what Internal Messages you are sent each night. Only the HMIS Staff can change permissions, however it is useful for all staff to understand some of the permissions that exist.

### Internal Audit Messages

The system can send you nightly messages through the HMIS messaging system about a variety of topics. You can get a message anytime someone modifies a Face Sheet, biweekly messages about all the intakes and discharges at your agency, notifications that alert you to keywords that have been written in Progress Notes, as well as many other types of messages. A full list of the possible Audit Messages that you can receive is found in the Online Help Manual.

One audit message that is helpful if you use the Charting Timetable Events is the "Charting Timetable Reminder" messages which sends you reminders about the events and assessments that you schedule for clients. You can request this permission, or any of the Audit Messages by sending a message to the HMIS staff.

### Business Rules Data Entry

Business rules define the default date range for entering Progress Notes and Contact Logs. By default users have 10 days to enter Notes, or 30 days with the Backdating Progress Notes Permit. We can modify these permissions upon request on a program-by-program basis. Many programs are configured to allow notes to be written within 30 days by default or up to 999 days with the Backdating Progress Notes permit.

### Backdating Permits

All sections of the database have a default date range for data entry. If users fall behind on paperwork they can request one of several backdating permits. Use the Help Desk found under the Help Menu to request a backdating permit.

- ❖ Backdated Contact Logs/Group Notes – Changing this permission will give you a large data entry window for Contact Logs and Group Notes. Note that with this permission discharged clients will show up on your list of Group Note attendees.
- ❖ Service Plan Backdated Data Entry – Allows backdated and future-dated action plans. This permission is given to all users by default.
- ❖ Backdated Progress Notes Data Entry – Allows notes to be entered up to the backdating window set by Business Rules.
- ❖ Startup Period Backdating – This permission allows backdated intakes and discharges. We require all programs to process intakes and discharges within 2 weeks, so this permit is only given to help users catch up on data entry. This permit lasts for 30 days and then reverts back to the default window. Some funding sources such as SHP and ESG grants require data entry within 2 weeks and may penalize agencies for excessively requesting this permit.

A full list of permissions is found in the Online Help Manual. If you need a permission to be changed, please send a message to the "Help Desk" found in the Help Menu.



## Questions?

Please contact any of the HMIS Staff if you have a question. Our contact information is found on the HMIS website at <http://www.in.gov/ihcda/>. Click on "HMIS & Data Collection." Review the "Important HMIS Documents" page for new instructional material, and visit our "Training Calendar" for a list of upcoming Webinars.

Remember that Online Help is always available inside HMIS from the Help Menu. In addition, please use the "Help Desk" button in the Help Menu if you encounter any glitches where something is not working the way you expect it to. The sooner people let us know about a problem the faster we can get it resolved.

